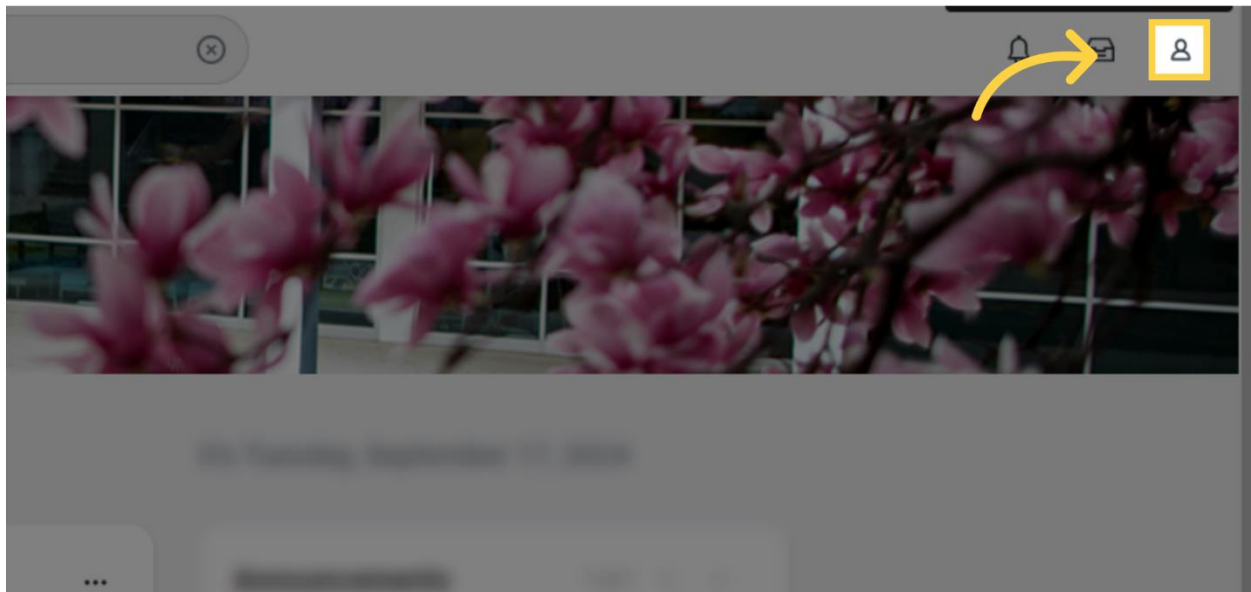


# Grant a Third-Party Access to View Your Student Record

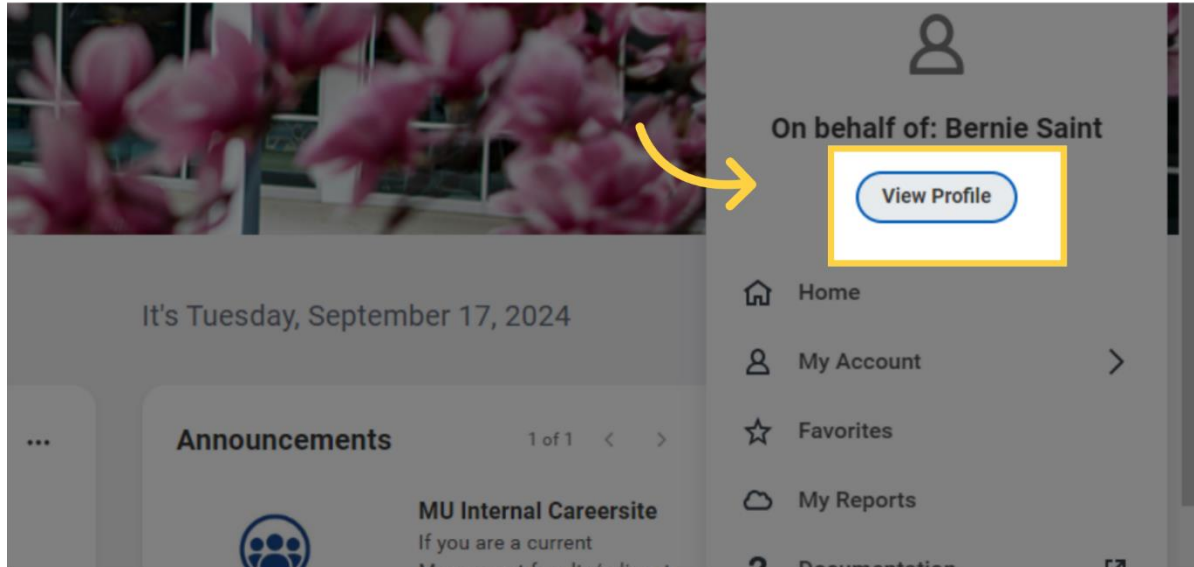
## 1. Access your Profile

Click on the person icon or picture at the top right of the Workday homepage.



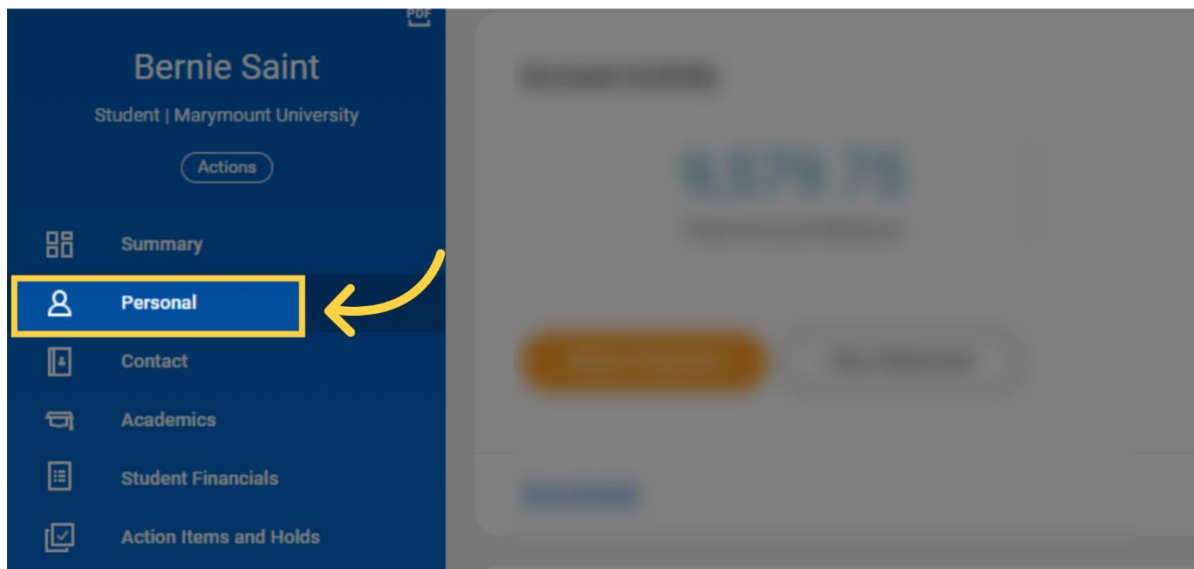
## 2. Click "View Profile"

Select View Profile from the popup.



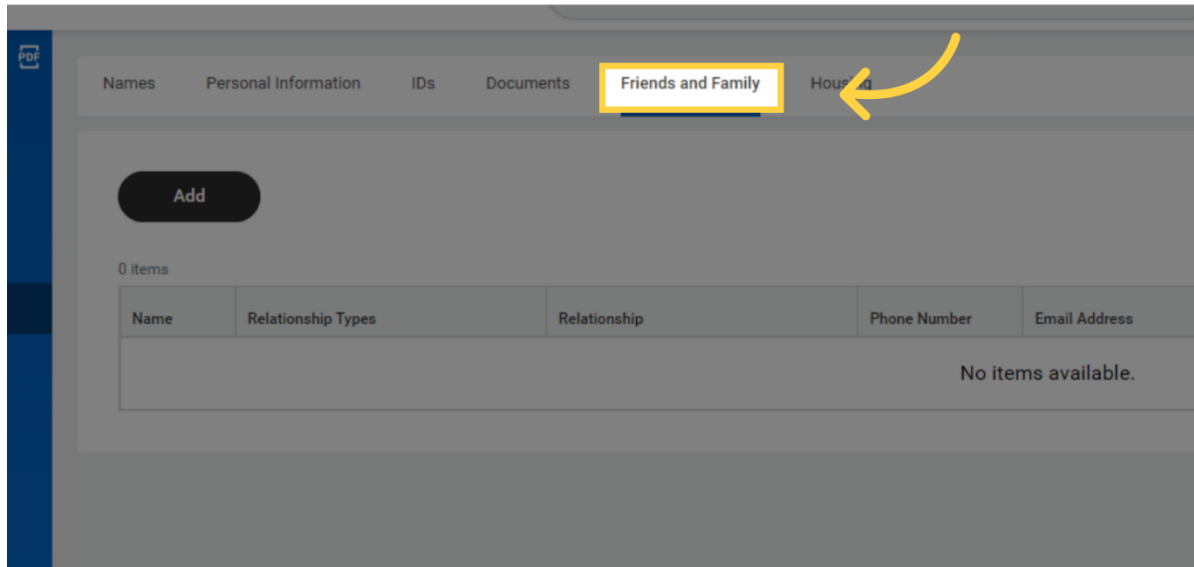
## 3. Click "Personal"

Select the Personal menu.



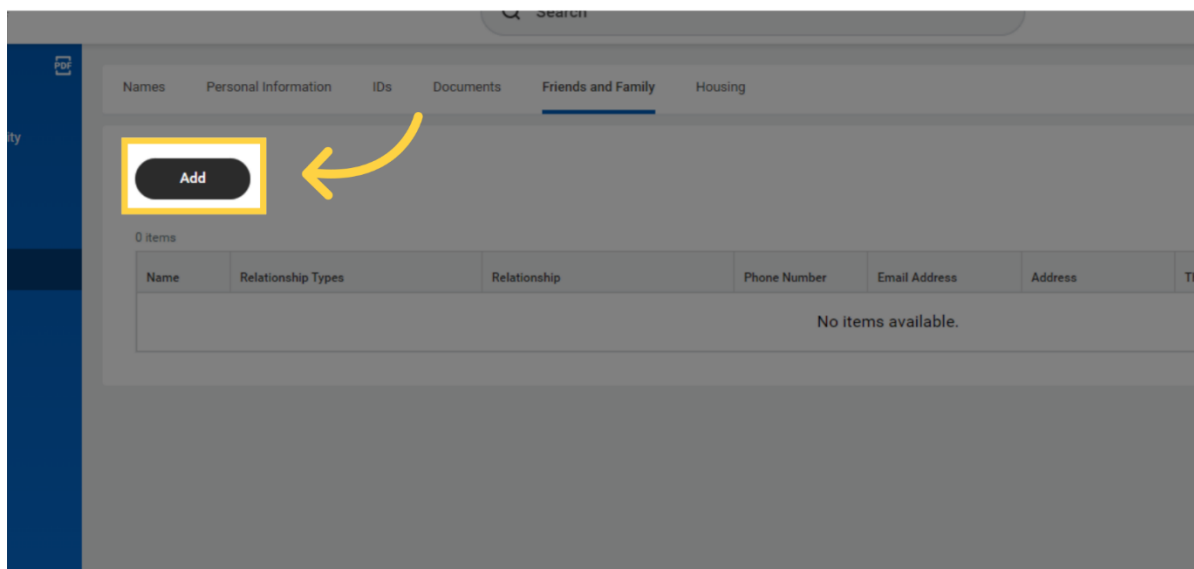
#### 4. Click "Friends and Family"

Select the Friends and Family tab.



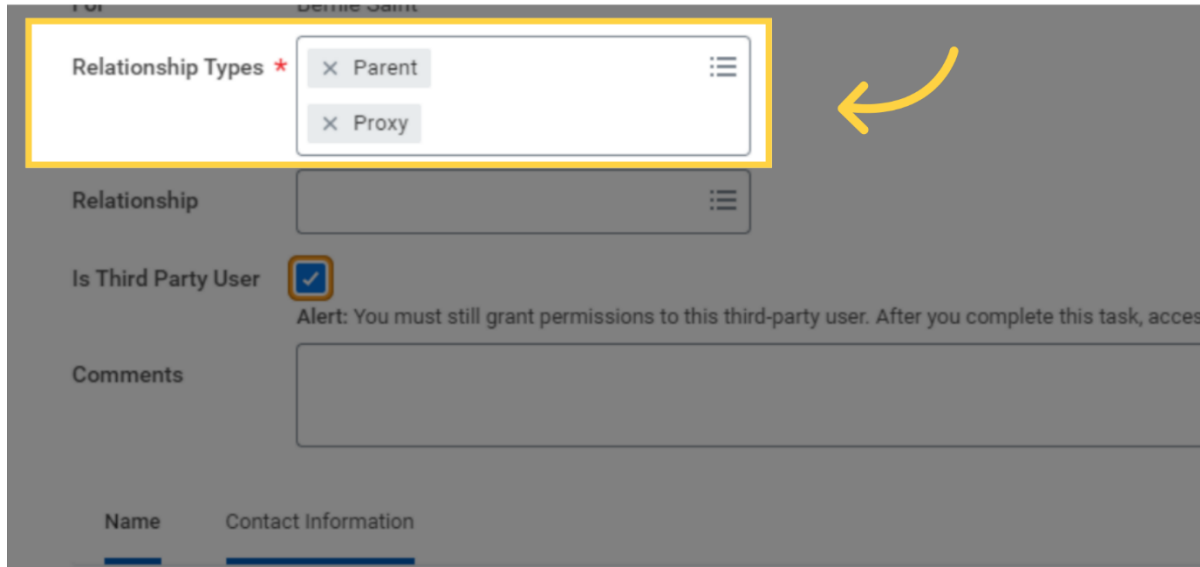
#### 5. Click "Add"

Begin the process by selecting "Add."



## 6. Enter Relationship Type

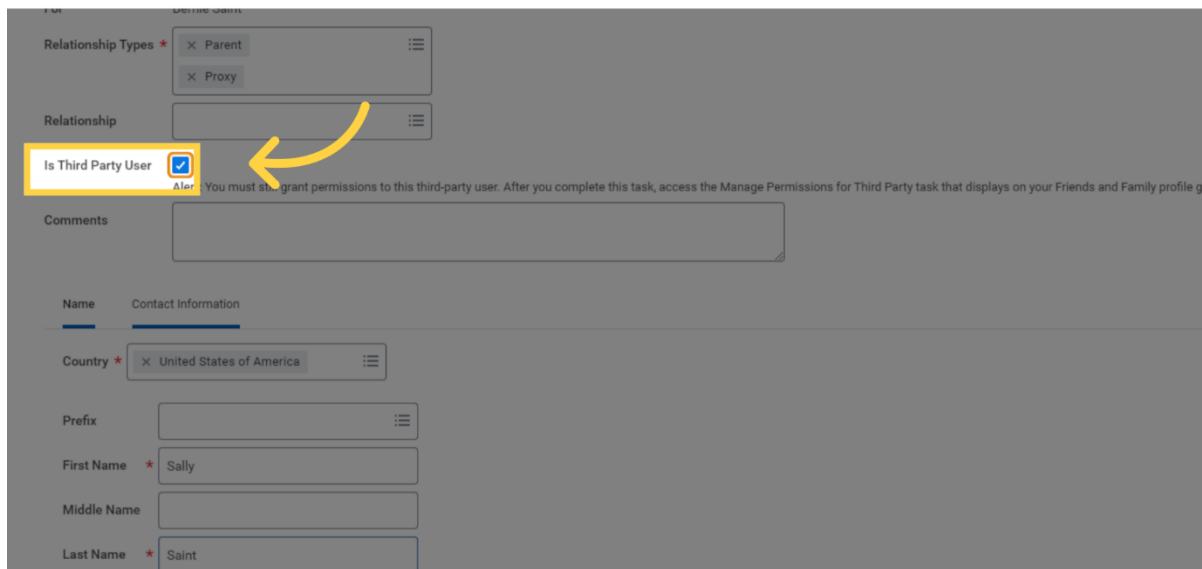
Select the relationship of the person to you from the dropdown.



A screenshot of a user profile form. The 'Relationship Types' dropdown menu is highlighted with a yellow box and contains two options: 'Parent' and 'Proxy'. A yellow arrow points to this dropdown. Below it, the 'Relationship' dropdown is visible. The 'Is Third Party User' checkbox is checked. An alert message reads: 'Alert: You must still grant permissions to this third-party user. After you complete this task, access the Manage Permissions for Third Party task that displays on your Friends and Family profile page.' The 'Comments' section is a text area. At the bottom, there are tabs for 'Name' and 'Contact Information'.

## 7. Check the box

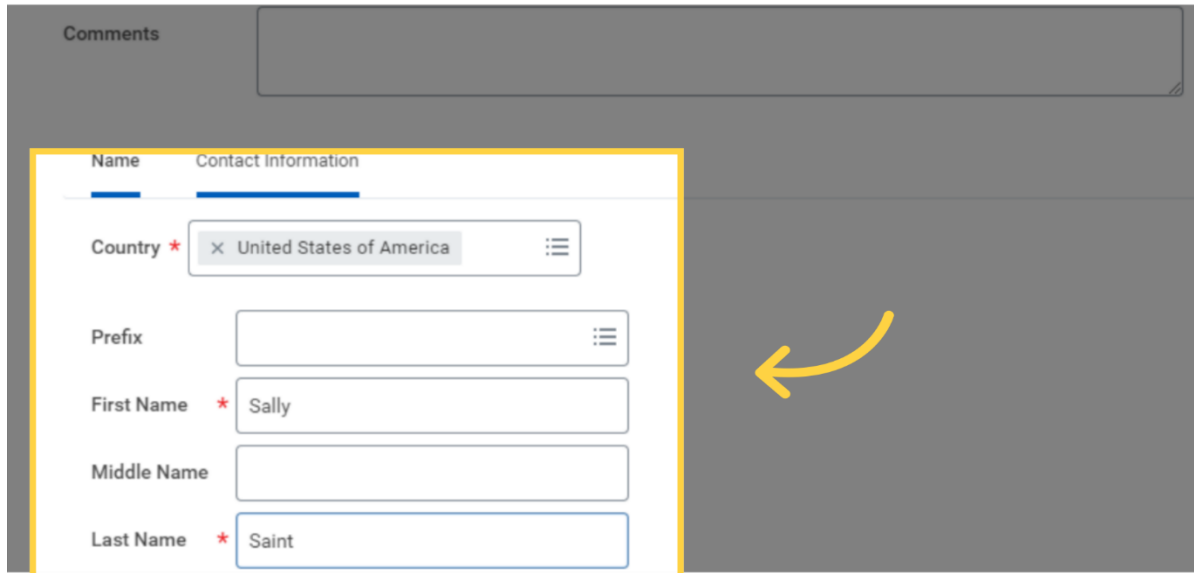
Check the "Is Third Party User" box to generate an account for the user.



A screenshot of a user profile form. The 'Is Third Party User' checkbox is checked and highlighted with a yellow box. A yellow arrow points to this checkbox. The 'Relationship Types' dropdown menu is visible above it, containing 'Parent' and 'Proxy'. Below the 'Is Third Party User' checkbox, an alert message reads: 'Alert: You must still grant permissions to this third-party user. After you complete this task, access the Manage Permissions for Third Party task that displays on your Friends and Family profile page.' The 'Comments' section is a text area. At the bottom, there are tabs for 'Name' and 'Contact Information'. Below the tabs, the 'Country' dropdown menu is set to 'United States of America'. Other fields include 'Prefix', 'First Name' (Sally), 'Middle Name', and 'Last Name' (Saint).

## 8. Enter Name

Enter the person's name.



Comments

Name Contact Information

Country \* x United States of America

Prefix

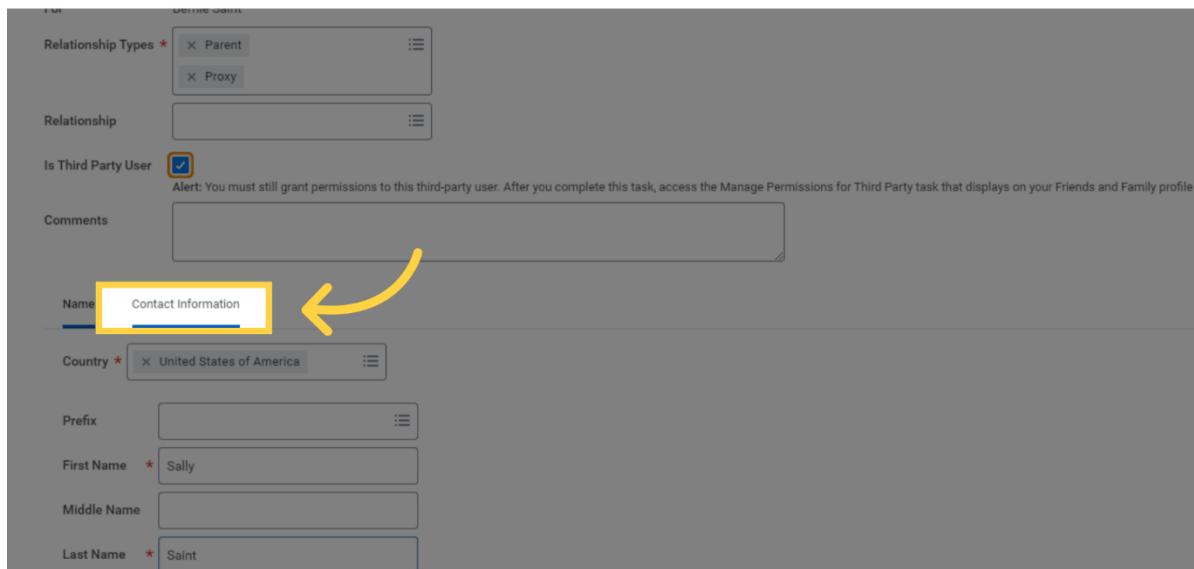
First Name \* Sally

Middle Name

Last Name \* Saint

## 9. Click "Contact Information"

Select the Contact Information tab.



Relationship Types \* x Parent x Proxy

Relationship

Is Third Party User

Alert: You must still grant permissions to this third-party user. After you complete this task, access the Manage Permissions for Third Party task that displays on your Friends and Family profile

Comments

Name Contact Information

Country \* x United States of America

Prefix

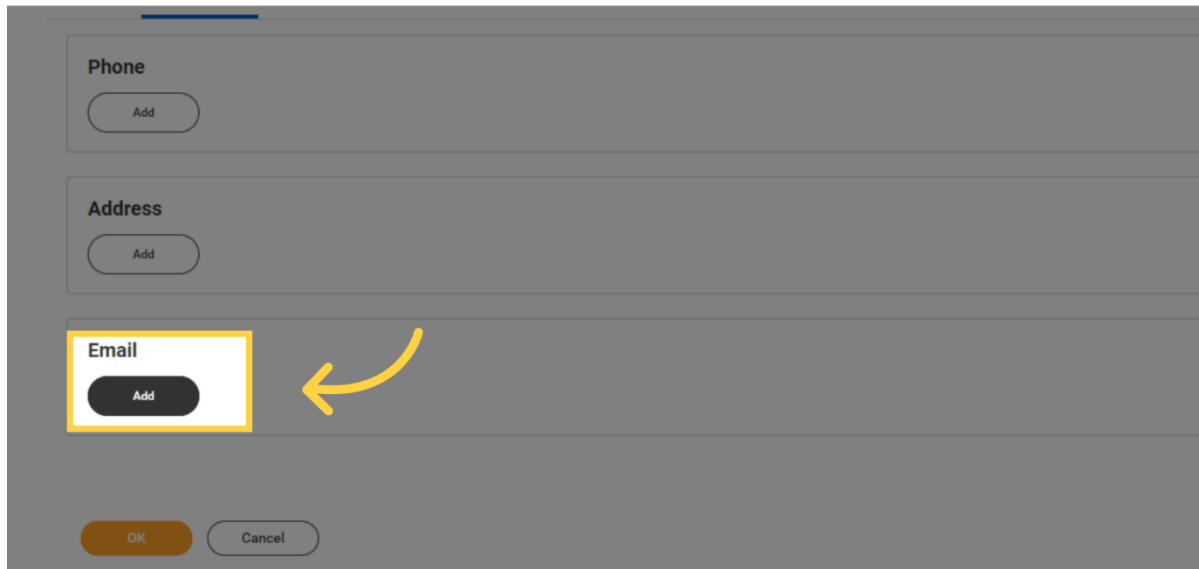
First Name \* Sally

Middle Name

Last Name \* Saint

## 10. Click "Add"

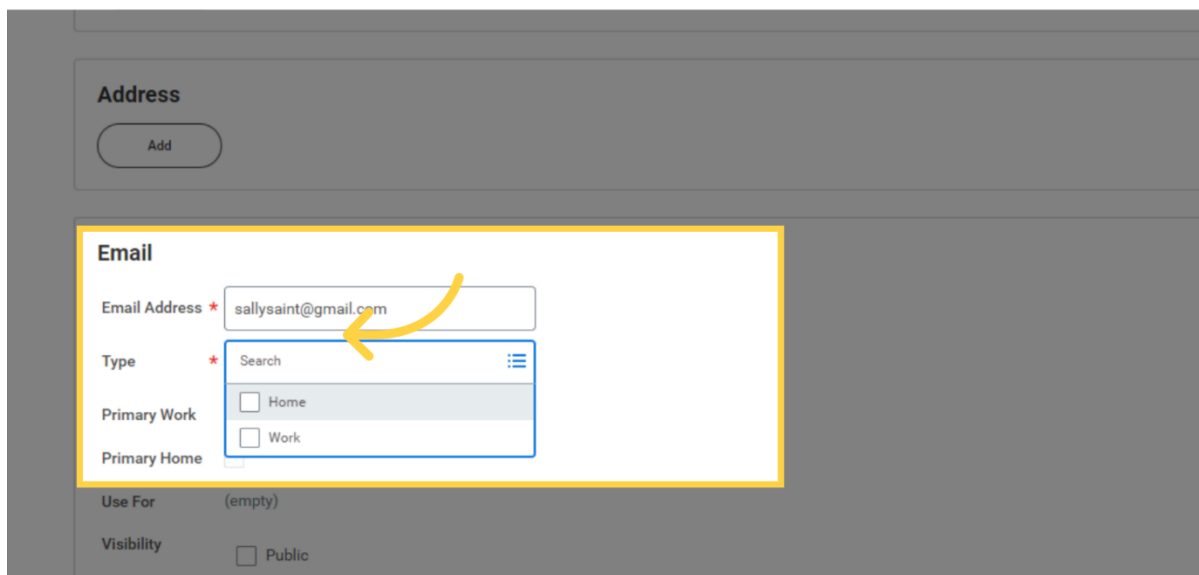
Click add for Email. You can enter other contact information as well, but an email is required to create a third-party account.



The screenshot shows a contact form with three sections: Phone, Address, and Email. Each section has an 'Add' button. The 'Email' section and its 'Add' button are highlighted with a yellow border. A yellow arrow points from the right towards the 'Add' button in the Email section. At the bottom of the form are 'OK' and 'Cancel' buttons.

## 11. Enter Email

Enter the email and select if it is a Home or Work email.



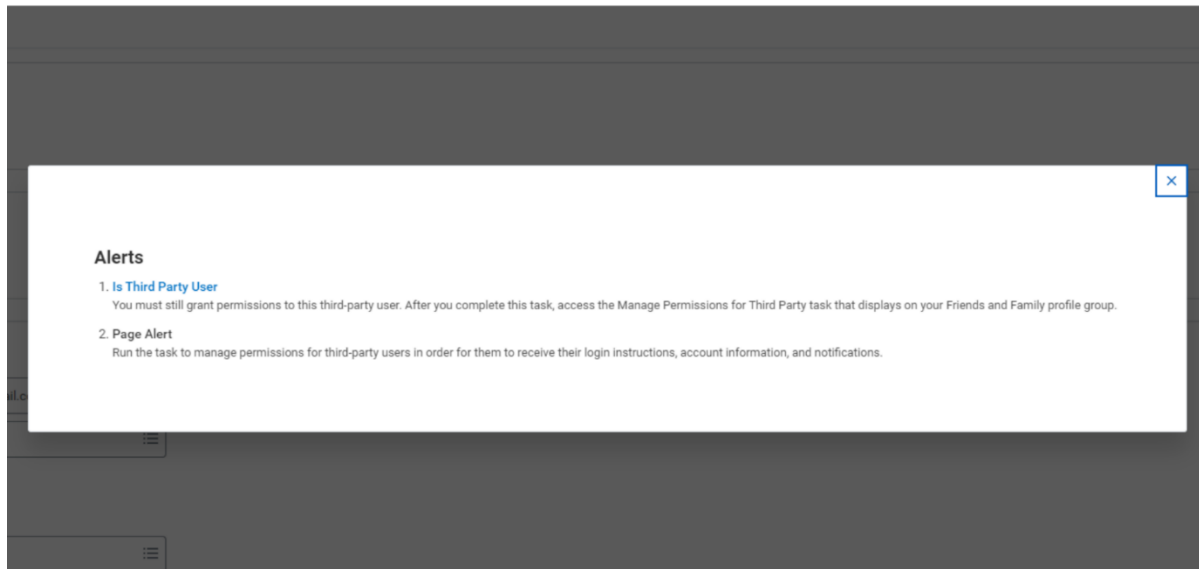
The screenshot shows the 'Email' form with the following fields and options:

- Email Address \***: sallysaint@gmail.com
- Type \***: Search (dropdown menu open)
- Primary Work**:  Home
- Primary Home**:  Work
- Use For**: (empty)
- Visibility**:  Public

The 'Email' section is highlighted with a yellow border. A yellow arrow points from the right towards the 'Email Address' field.

## 12. Click "OK"

Click OK to submit. You will receive a warning message reminding you there is an additional step to complete the third-party set up.



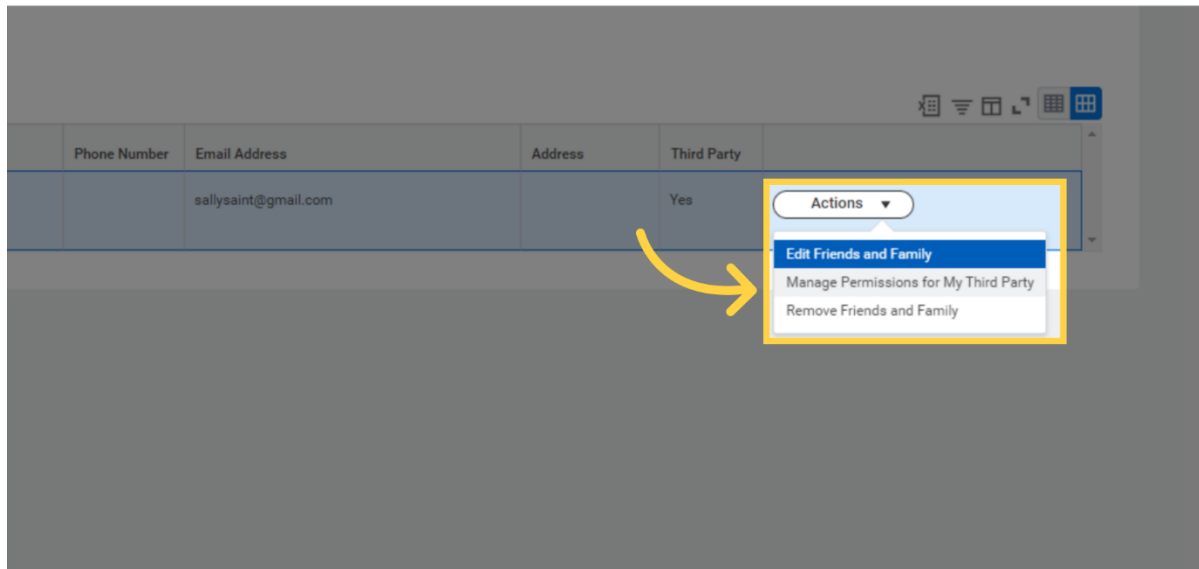
## 13. Click "Done"

Click Done to return to your profile to complete the final steps.



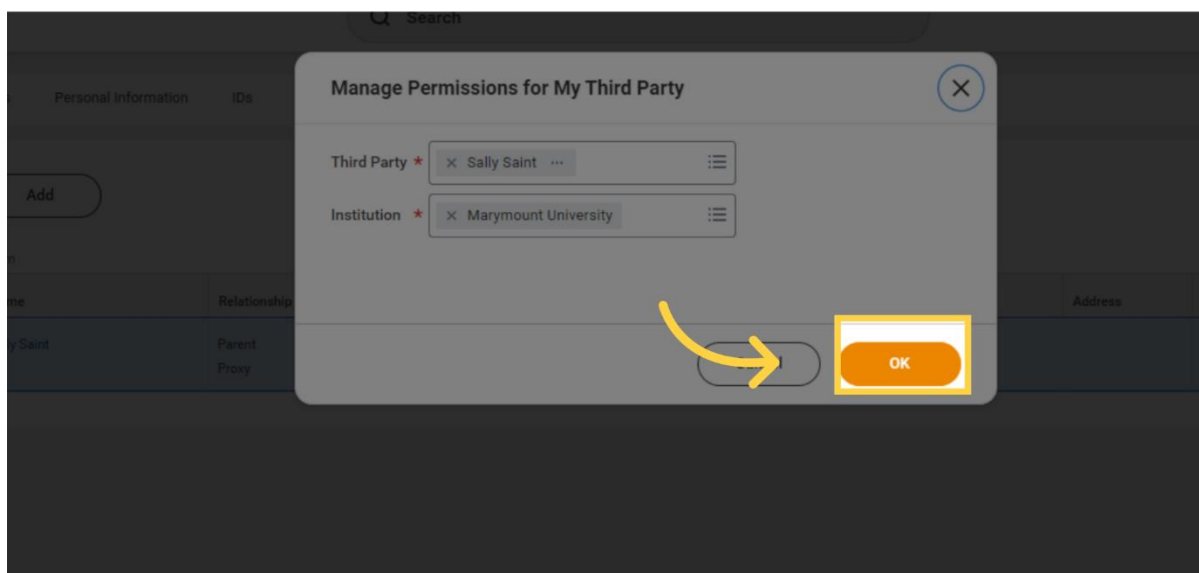
## 14. Click "Actions"

Click the Actions button on the right side of the screen and select Manage Permissions for My Third Party.



## 15. Click "OK"

Confirm the action by clicking "OK".



## 16. Select What to Share

Check the Allowed box for anything you want to give the third party access to. If you do not want a third party to access any of the items on this page, do not check the box.

Relationship (empty)

### Tasks Available for Third Party User

Task Name	Make a Payment
Description	This task gives access to make a payment on the student's behalf.
Allowed	<input checked="" type="checkbox"/>

Task Name	View Financial Aid Package
Description	This task gives access to view the financial aid details on the student's behalf, including details around what financial aid is offered and what the estimated
Allowed	<input type="checkbox"/>

Task Name	View Account Activity
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## 17. Click "OK"

Clicking "OK" to submit.

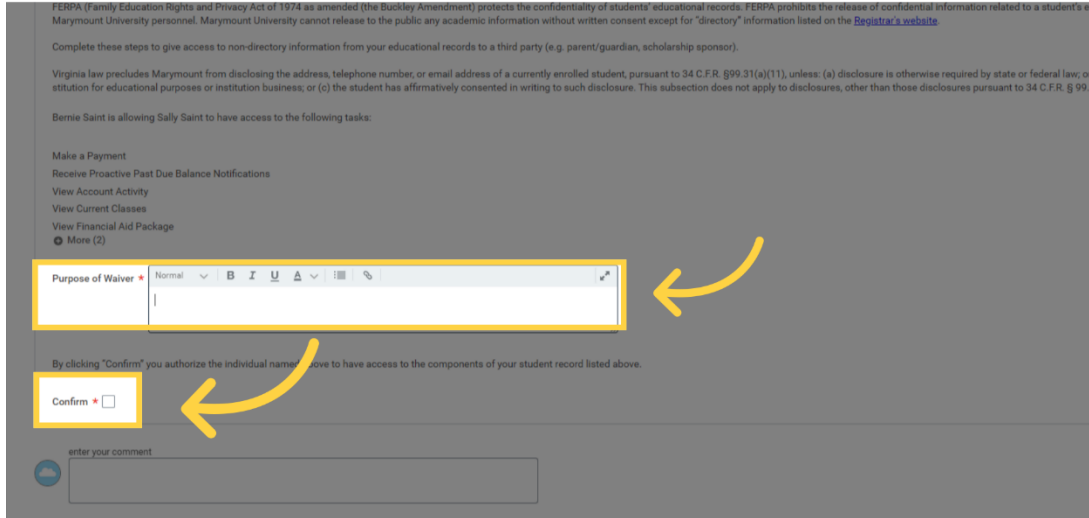
Description	This option displays courses that the student is charged for on the student statement.
Allowed	<input type="checkbox"/>

Task Name	View Current Classes
Description	This task gives access to the student's currently registered courses.
Allowed	<input checked="" type="checkbox"/>

Task Name	View Student Grades
Description	This task gives access to the student's grades.
Allowed	<input checked="" type="checkbox"/>

## 18. Confirm Request

Enter a reason for the request and check the box to confirm the action.



FERPA (Family Education Rights and Privacy Act of 1974 as amended (the Buckley Amendment)) protects the confidentiality of students' educational records. FERPA prohibits the release of confidential information related to a student's education to any third party without the student's written consent. Marymount University personnel. Marymount University cannot release to the public any academic information without written consent except for "directory" information listed on the [Registrar's website](#).

Complete these steps to give access to non-directory information from your educational records to a third party (e.g. parent/guardian, scholarship sponsor).

Virginia law precludes Marymount from disclosing the address, telephone number, or email address of a currently enrolled student, pursuant to 34 C.F.R. §99.31(a)(11), unless: (a) disclosure is otherwise required by state or federal law; or (b) the student has affirmatively consented in writing to such disclosure. This subsection does not apply to disclosures, other than those disclosures pursuant to 34 C.F.R. § 99.31(a)(11), that are necessary for the institution to carry out its educational purposes or institution business; or (c) the student has affirmatively consented in writing to such disclosure. This subsection does not apply to disclosures, other than those disclosures pursuant to 34 C.F.R. § 99.31(a)(11), that are necessary for the institution to carry out its educational purposes or institution business; or (c) the student has affirmatively consented in writing to such disclosure.

Bernie Saint is allowing Sally Saint to have access to the following tasks:

- Make a Payment
- Receive Proactive Past Due Balance Notifications
- View Account Activity
- View Current Classes
- View Financial Aid Package
- More (2)

Purpose of Waiver \*

By clicking "Confirm" you authorize the individual named above to have access to the components of your student record listed above.

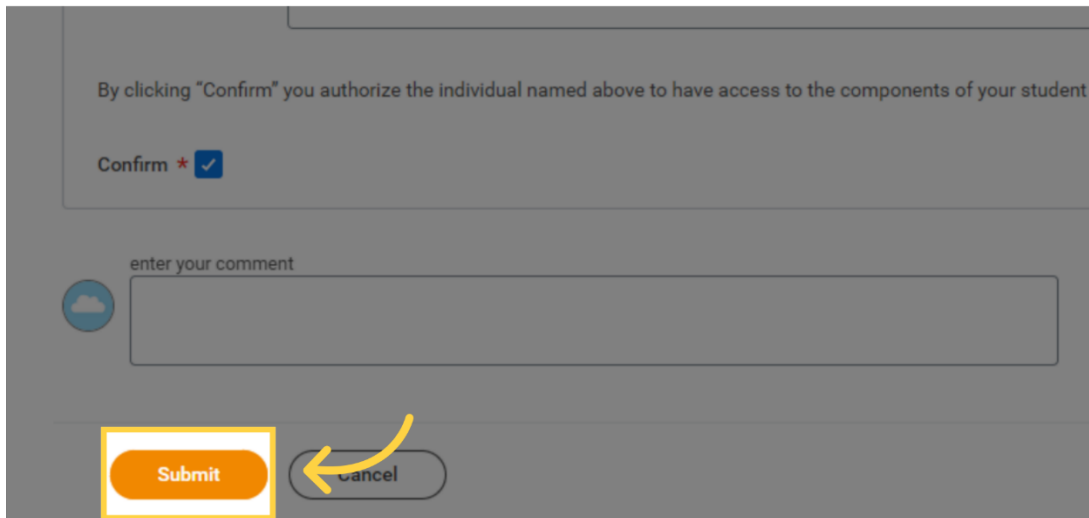
Confirm \*

enter your comment

This screenshot shows a web form for granting access to student records. A yellow box highlights the 'Purpose of Waiver' text area, and another yellow box highlights the 'Confirm' checkbox. A yellow arrow points from the 'Confirm' checkbox to the 'Purpose of Waiver' text area.

## 19. Click "Submit"

Finalize the process by clicking "Submit. You can edit this access at any time by returning to Manage Permissions for My Third Party. Your third party will receive two emails from marymount@workday.com with the subject "Third Party Access to Student Account". The first email will have their user ID and the second will include the login link and a temporary password. Please notify them to expect these emails as the password will expire if it is not used within a few days.



By clicking "Confirm" you authorize the individual named above to have access to the components of your student record listed above.

Confirm \*

enter your comment

Submit Cancel

This screenshot shows the bottom portion of the form. The 'Confirm' checkbox is now checked. A yellow box highlights the 'Submit' button, and a yellow arrow points from the 'Submit' button to the 'Cancel' button.